

WORKFLOW GUIDE —

Create Onboarding Object + Initial Hand-off



You will need:

- Enable Service object
- Create Service pipeline
- Create corresponding Service properties you want to copy from the deal

Tip:

If you have potential for clients to go through Sales pipeline more than once, you will need to determine a property to use to base criteria on so that this only triggers when necessary.

► Trigger

Type: Record meets a set of filter conditions

Object Type: Deal

Conditions: Deal stage is Closed Won + Other important custom fields (Ex. Service Package)

Re-enrollment: Off

Type: Create record

Include: Service object name with established naming conventions, set Service pipeline + stage, copy necessary properties from Deal to Service, associate necessary objects like Contacts/Companies

Type: Create task

Options: Assign Service Object Owner

OR

Use other established rules for routing assignments for new onboarding customers

► Trigger

Type: Record meets a set of filter

conditions

Object Type: Service

Conditions: Service stage is 1st Stage + Service Owner is known

Re-enrollment: Off

Type: Create task

Options: Coordinate internal

kick-off call

Type: Send email

Options: Onboarding Welcome

email

Tip:

Use an automated
Onboarding "Welcome"

Onboarding "Welcome" email to get your new customer excited! You can send an onboarding questionnaire or provide insights on their next steps while introducing their new point of contact on the service team.



